PRINCIPLES OF ASSESSMENT MAPPING

LESSON VIII

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OFFICE ADMINISTRATION
AND
EFFECTIVE COMMUNICATIONS

Ministry of Revenue
Assessment Standards Branch
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FOREWORD

The study of administration, including office management and leadership, is a broad and complex discipline. A great deal has been written on this subject, much of it directed towards the rising executive.

This paper discusses some practical aspects of managing a small office. For the student who wishes to conduct a more thorough investigation of this topic, a suggested reading list is included in Appendix A. Since many of the problems in small offices stem from lack of adequate communication; 'Communication' in its various forms is the main theme of this paper.

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PART I - OFFICE ADMINISTRATION

Introduction

It is assumed that the student of this course is either a Mapping Supervisor already, or has the potential to become one. This lesson is intended to touch briefly on those aspects of the mapping operation that can be termed "Administration" as compared to the actual work of mapping.

1. THE ORGANIZATIONAL STRUCTURE

All organizations are sub-divided into operating units. In theory, the division may be by geographic area, or by function. In reality, most organizations are a combination of the two. Assessment mapping is divided geographically into 31 regions, each performing essentially the same operation, and functionally within each region, i.e., the mapping office is distinct from the rest of the assessment office and the work performed by the staff is usually divided functionally into drafting, tracing and registry searching. The chart on pages 20 and 21 of Lesson I clearly indicate this division by function and also provide a good example of Formal Organization.

(a) Formal Organization

This is a theory of organization in which definite positions exist, each responsible for a defined work area, and with clearly defined lines of authority and communication. Each employee should be answerable directly to one supervisor. Conversely, each supervisor should have clear responsibility for his defined work and clear authority over the personnel engaged in this work.

If this sort of formal structure is not established, the result is a situation where everyone is responsible for everything and no one is responsible for anything, and chaos invariably ensues! Everyone avoids the unpleasant jobs and if something is not done, nobody can be held responsible.

An example of a lack of proper organization would be a deeds clerk who received work and directions from the Mapping Supervisor, the Supervisor of Assessment Clerks, the various Managers and occasionally the Assessment Commissioner.

The deeds clerk would have no way of knowing which job had priority, and none of the senior staff would know whether the clerk was working efficiently. Discipline would become difficult as authority became diffused.

If, on the other hand, the deeds clerk was made clearly answerable to the Mapping Supervisor only, and all other work was channelled through him, proper priorities could be established and disciplinary action taken if the work output was inadequate.

Another consideration when establishing a formal structure is "span of control". A bricklayer can only lay so many bricks in a day; a mailman can only make so many deliveries in a day; in the same way, a supervisor can only supervise a finite number of subordinates. If he attempts to assume personal responsibility for too many people or too many operations, he "spreads himself too thin" and the organization begins to break down. This kind of situation may occur when a supervisor is insecure and wishes to prevent the emergence of potential rivals, or if he does not trust his staff.

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A capable administrator will not hesitate to delegate authority to competent subordinates and free himself for policy decisions and long-range planning. A man who is too busy with day-to-day details to devote time to long-term goals will ultimately fail in his role as an administrator. A study of the Organization Charts in Lesson I shows clearly how each administrator in the Assessment Division is directly involved with only a limited number of people immediately below him.

Each person in the organization - supervisor or subordinate - should have clearly defined duties and responsibilities, preferably in writing. Each position in the Civil Service is clearly outlined by the Personnel Branch of each Ministry in a set of specifications. The job specifications for Draftsman 1, Mapping Supervisor, and the Registry Clerk are given here effective October, 1978.

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POSITION SPECIFICATION AND CLASS ALLOCATION FORM

POSITION TITLE

DRAFTSMAN

IMMEDIATE SUPERVISOR'S TITLE

MAPPING SUPERVISOR

MINISTRY	DIVISION
REVENUE	ASSESSMENT

PURPOSE OF POSITION

To prepare and update land ownership maps for the assessment region.

SUMMARY OF DUTIES AND RESPONSIBILITIES

1. Prepares land ownership maps using basic raw materials by performing duties such as:
0%
   - collecting, collating and synthesizing the available information obtained from a variety of private and government sources i.e. registered deeds and documents, bylaws, etc., surveys, zoning plans, aerial photographs, Ministry of Transportation and Communications land plans, maps etc.;
   - on the basis of experience and knowledge of requirements, selecting from the above data the information relevant to the preparation of land ownership maps;
   - resolving minor discrepancies in the information provided (e.g. bearings and measurements are different on same line, errors in land deed descriptions etc.) through consultation with registry clerk(s) and/or assessor(s) who has visited the site, the local survey office or the planning board; if problem is complex referring the Mapping Supervisor;
   - determining topography of land i.e. hedges, fences, shore-lines, etc. through aerial photographic interpretation;
   - delineating land ownership boundaries by ploting all search data, topographical features, concession lines, major roads etc.;
   - identifying each property on a map by owner's name, legal description and assessment number;
   - completing maps in final mylar form using the proper letter and number sizes, adding notations, map number, etc.;

2. Updates land ownership maps on a continuous basis to reflect changes such as:
   - changes in assessment roll numbers through conveyances and consolidations;
   - amendments to include road widenings, expropriations, reference plans and registered plans;
   - changes in the limits of ownership.

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3. SUMMARY OF DUTIES AND RESPONSIBILITIES CONTINUED ...

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8. Performs other related duties such as:
   - preparing exhibit material such as graphs and charts indicating market value trends, sales ratios, depreciation rates by location, and the other related information;
   - preparing basic exhibits for use in the Assessment Review Tribunals; including reproducing maps in whole or in part;
   - making prints of maps using white print machine, as required;
   - filing maps in map storage cabinets;
   - keeping the drafting office in a clean and tidy condition, cleaning equipment and machines;
   - searching titles in registry offices and photo-copying deeds as required
   - as assigned.

SKILLS AND KNOWLEDGE REQUIRED TO PERFORM THE WORK

Grade 12 secondary education, preferably Grade 13 mathematics or an equivalent combination of education and experience. Good knowledge of drafting, mapping, and mechanical lettering. Knowledge of survey techniques would be an asset. Ability to understand and follow detailed instruction. Years of experience as per staffing standards.

POSITION SPECIFICATION AND CLASS ALLOCATION FORM

POSITION TITLE

MAPPING SUPERVISIOR

IMMEDIATE SUPERVISOR'S TITLE

MANAGER, ASSESSMENT SERVICES

MINISTRY	DIVISION
REVENUE	ASSESSMENT

PURPOSE OF POSITION

To organize and supervise the Mapping Section in the preparation and maintenance of assessment maps; to oversee the searching of Registry records for legal descriptions and ownerships of properties; to supervise the issuing of lien clearances.

SUMMARY OF DUTIES AND RESPONSIBILITIES

1. Supervises the mapping operation by performing such duties as:
   - analyzing mapping priorities by meeting with Supervisor and Commissioner to discuss which part of the region should be mapped first;
   - checking with Registry Clerks to determine how long it would take to carry out searching for legal descriptions and ownerships, to determine when mapping can begin;
   - establish working contacts with other government offices, municipalities, private agencies etc. in order to gather all necessary information including survey plans, drawings and existing maps, for use in preparation of maps;
   - giving title search material and base material to drafting staff for use in preparing map layouts;
   - where information is missing or where there is a discrepancy in size as noted or location of property, making a site visit to resolve the problem by visual inspection, measuring if necessary and talking to listed owner;
   - visually checking finished map for quality, accuracy and good standard of workmanship;
   - ensuring that work schedules are being met and that the field assessors are supplied with proper maps as they are required;
   - maintaining filing system of all maps, surveys, searches etc.;
2. Supervises the transfer staff (Registry Clerk(s) and Lien Clearance Clerk(s) by performing such duties as:
   - assigning work to the registry clerk(s) on the basis of mapping priorities, checking periodically to ensure that the searched material is accurate in proper form and is accurate in proper form and is submitted to mapping staff on schedule;
   - as required, keeping production records of the transfer staff;
   - ensuring that Lien Clearances are issued by the Lien Clerk(s) under the Land Speculation Tax Act;

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- assisting as required with problem searches, as well as with any difficulties in lien clearances;
- providing advice to the registry clerk(s) and lien clerk(s) and assistance when difficulty is encountered in complex searches on lien clearances;
- visiting the Registry Office(s) in the Region several times a year to meet with the Registry Clerk(s) and the Registry Office Staff to ensure that there is an exchange of information and mutual co-operation;
- where applicable providing T.E.E.L.A. when deeds have been transferred and when T.E.E.L.A. returns a sales listing for use by the manager checking the listing visually to ensure that information required is incorporated;
- forwarding the sales sheets to the municipal clerks for their information.

3. Performs the more involved drafting-mapping assignments by
20% performing duties such as:
- resolving serious descrepancies in information collected using own judgement based on past experience and as necessary making site visits, personal contact with surveyors, and by talking to property owners;
- using the above information to complete land ownership maps by applying drafting knowledge and techniques;
- preparing court exhibits for the use of assessors appearing before the various appeal tribunals and providing advice as requested.

4. Carries out the day to day operations of the Mapping Section
15% by performing such suties as:
- interviewing, testing and selecting new staff in conjunction with the Manager Assessment Services;
- providing training for new staff in working procedures, mapping objectives, office deportment; and for existing staff in new policies and procedures;
- evaluating the performance of staff by completing an Employee Appraisal Form for each employee; reviewing with Supervisor prior to discussion with each employee;
- arranging vacation schedules, granting time off, approving overtime etc.;
- recommending merit increases, promotions, demotions, appointments to regular staff etc.;
- administering normal staff discipline, referring serious cases to Supervisor with recommendation as to action to be taken;

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. SUMMARY OF DUTIES AND RESPONSIBILITIES CONTINUED ...

- resolving employee problems and grievances verbally and in writing;
- identifying need for additional staff during heavy workload periods and obtaining approval of Supervisor to engage on a temporary basis;
- advising valuation managers and assessors on specific property locations, zoning restrictions, topographic features, land severences, new sub-divisions, etc. pertaining to the assessment region using the information and knowledge gained in preparing maps for the region;
- determining mapping materials to be used and quantities required to complete assignments;
- maintaining supplies and advising Office Manager in writing of supply requirements.

5. Other duties
5% - as assigned.

SKILLS AND KNOWLEDGE REQUIRED TO PERFORM THE WORK

Grade 12 secondary education, preferably Grade 13 mathematics, or an equivalent combination of education and experience. Good knowledge of drafting techniques, work procedures, pertinent statutes and Ministry policies. Ability to supervise. Years of experience as per staffing standards. Knowledge of Survey Techniques would be an asset.

POSITION SPECIFICATION AND CLASS ALLOCATION FORM

POSITION TITLE

REGISTRY CLERK

IMMEDIATE SUPERVISOR'S TITLE

MAPPING SUPERVISOR

MINISTRY	DIVISION
REVENUE	ASSESSMENT

PURPOSE OF POSITION

Working mainly out of Registry/or Land Titles Office(s) to establish ownership, size, location and legal description of properties for mapping purposes and assessment roll.

SUMMARY OF DUTIES AND RESPONSIBILITIES

1. Establishes the proper legal descriptions of all properties in the
0% region by performing such duties as:
   - receiving assignments from the Mapping Supervisor covering a section of the assessment region requiring searching;
   - thorough examination of records such as Deeds, Indentures, Agreement for Sale in the Registry/or Land Titles Office(s) establishing for each property the correct legal description, dimensions and/or size, location, ensuring that all properties in section have been accounted for;
   - completing draft sketches of each property to ensure adjoining properties fit and do not overlap and showing ties, bearings, boundaries, H.E.P.C. Bell Canada easements, road widenings, etc. from information given in Deeds and other records;
   - returning completed searches to the Mapping Supervisor.

2. Verifies and/or establishes ownership of properties by performing such
0% duties as:
   - checking abstract book to determine the most recent transfer of property extracting name of new owner, location and transfer number and locating deeds to the properties;
   - where a search indicates a property split or severance, completing an apportionment form, for forwarding the respective Valuation Manager for valuation, and copies to the Mapping Supervisor for map updating and the Municipal Clerk for municipal tax apportionments;
   - keeping daily record of deeds received and making copies of such Deeds and transfer and survey if attached, for Assessment Services as required;
   - reporting inaccuracies in Deeds by following the Assessment Solicitors, the surveyor, the Master of Titles, the Regional Assessment Commissioner or the Mapping Supervisor;

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3. SUMMARY OF DUTIES AND RESPONSIBILITIES CONTINUED ...

- searching specific properties where there is an urgency such as appeals and as requested by Manager of Assessment Services and/ or Mapping Supervisor;
- as required checking properties liable to be sold for arrears of taxes listing each such property as to correct ownership, instrument number, liens, mortgages, etc. for Manager of Assessment Services.

3. Processes Lien Clearance Applications by performing such duties as:
- receiving applications from vendors of properties for the issuance of Lien Clearances under the Land Speculation Tax Act;
- checking to ensure that the applications and instruments are properly presented and whether such instruments fall within the provisions of the Act or outside the Act and if it cannot be clearly determined if application is within or outside the provisions of the Act, returning applications to applicants for additional information or explanation;
- issuing lien clearances by applying the lien clearance stamp on the application and the instruments, entering serial number of the application in the appropriate place on the stamped instrument, signing and dating lien clearance stamp, collecting tax payable, issuing receipt showing serial number of application, returning stamped and approved instruments with extra documents to the applicant and forwarding a copy of applications and undertaking (when applicable) with cheques attached to the Land Speculation Tax Section;
- keeping informed of the provisions of the Land Speculation Tax Act and regulations thereunder in order to answer correctly and efficiently the public's routine inquiries and directing the more complex inquiries to the proper persons at Head Office (Toronto).

4. Performs other duties such as:
- where applicable, completing sales considerations by extracting from Deeds the sale price of property, showing whether an all cash transaction, mortgage or mortgages, chattles and lien incumerances, and listing this information in prescribed format for forwarding to the Manager of Assessment Services or the Mapping Supervisor;
- as required, keeping daily or weekly record of the number of searches completed etc. and a record of all monies charged for registry office services and forwarding to Supervisor;
- assisting in the updating assessment data information, the preparation and up-dating of the valuation file etc. as required;
- as assigned.

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SKILLS AND KNOWLEDGE REQUIRED TO PERFORM THE WORK

Acceptable high school level, preferably Grade 12 or equivalent in education and experience; good knowledge of the Registry and Land Titles system and ability to read legal documents pertaining to property descriptions and ownership.

(b) Informal Organization

This heading covers the human element - the part of an organization that cannot be shown on an organization chart. No office can function like a machine with every operation anticipated, rules and procedures established for everything, and no employee ever having to think for himself. Such aspects as human intelligence, individuality, morale, initiative and personal contact are at least as important as rules, procedures, and authority.

Very often, there are more important contacts made, and more information exchanged, during coffee breaks and informal luncheons, than during organized meetings. These invisible contacts and lines of communication could never be charted - how often does a man 'phone an experienced friend in another section for advice on a problem, rather than going to his supervisor? Informal contacts with a wide variety of people in related fields, form a vital part of a successful operation.

There are three basic principles of informal organization that should be kept in mind:

1. Each employee should be allowed enough scope, within his defined work area, to develop his individuality and utilize his own talents. Organizations and operations change all the time, and an employee should have some freedom to try new approaches and innovations - subject of course to his responsibility to his supervisor.

2. Each employee should know <u>why</u> he is doing a job, and how his work contributes to the overall operation. If he doesn't know why he is doing something, he will inevitably make wrong decisions. A good organization keeps its employees informed and actively participating.

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3. Interaction with other people of similar interests often helps to stimulate new ideas and reach workable decisions. A good supervisor tries to develop a team spirit rather than have his staff competing with each other and developing feuds. Informal contact after hours can often be beneficial to all concerned. The Institute of Municipal Assessors arose originally from social contact between assessors, where mutual problems were aired. A formal organization, a training course, accreditation and professional status ultimately developed from these sessions.

2. OFFICE MANAGEMENT

Principles of organization provide only the barest framework. The actual duties are assigned by the supervisor, but again, these should be clear, unambiguous and, if possible, in writing. Each employee should be quite certain of his or her responsibilities. If one person is assigned to assist another, this should be made clear to both parties. Telling one female clerk to give work to another, without telling the second one that she is to accept it, will not lead to an amicable relationship, yet this sort of thing is distressingly common.

The ideal situation is where one person is made solely responsible for a project, given clear, written authority over any assistants, and permitted to make all day-to-day decisions concerning the work, without having to run to his supervisor constantly for decisions. Obviously this means that the supervisor must trust his subordinates. It is equally important that they trust HIM to back them up, look after their interests, keep them informed, and so on.

It is very satisfying to work in an organization where there is mutual respect, and good communication between supervisor and staff. Morale rises when everyone feels a part of the organization, knows what is going on, and feels that his or her work is appreciated. A good supervisor knows that morale and production move in the same direction. When morale is high, people will produce that little extra that no amount of pressure can ever produce. When morale is low, it becomes hard work for a supervisor to achieve an adequate output from his section.

At the same time, he must remember that familiarity breeds contempt. He must obviously maintain a certain gulf

between himself and his staff so that he can be fair and impartial, without showing any trace of favouritism. A good supervisor must win the respect of his staff without ever compromising his primary responsibility to his employer. He is being paid to achieve results. A respected supervisor can depend on the support and cooperation of his staff. A "tyrant" has to work very hard to achieve the same output.

(a) Discipline and Reward

Very few employees deliberately do their work badly. The average person wishes to avoid being dismissed; he may make mistakes through carelessness or inattention, but he is not going to deliberately do inaccurate work. Unfortunately, some employees do not quite appreciate how much work, and to what standard, is expected of them. Unknown to them, their supervisor may have quite unrealistic expectations. It is obvious that communication between supervisor and subordinate is vital.

All too frequently, an employee feels that he is doing his work adequately, but his supervisor thinks that he is too slow, or makes too many mistakes. If the supervisor says nothing, obviously the employee is going to continue in the same manner, and the supervisor will become progressively more irritated. The result is the familiar "chill in the air", and communications become progressively worse. Finally, the supervisor decides that he has "had enough", and the subordinate suddenly finds himself dismissed - quite unexpectedly and apparently unjustly!

Firing a subordinate is an admission of failure on the part of the supervisor! A good supervisor tries to resolve problems and achieve the best results from every subordinate.

He does not do this by hinting and "beating around the bush". People do not intuitively realize what is wrong if their supervisor is acting strangely. If a supervisor thinks that his subordinates should figure out for themselves why he is annoyed, he is displaying cowardice!

A good supervisor will discuss each subordinate's performance with him - pleasantly and in private. If he feels that his assistant is taking too long with a project, he should discuss it - maybe the original estimate was unrealistic, maybe the subordinate is taking more care than necessary. Above all, differences should be resolved at the beginning, with no hard feelings. An informal chat can "clear the air" and show the subordinate what he should be doing and how. It will also give him a chance to defend himself if he really is doing his best.

Misunderstandings are the biggest single cause of friction in offices. If a supervisor comes straight to the point, and endeavours to improve his subordinate's performance, everyone will benefit. Sending work back to be redone without explanation, and becoming cool, irritable and impatient, will only make the subordinate feel that he is being "picked on" and the problems will grow to the point of no return.

Above all, a supervisor who complains to others about his staff is advertising his own inadequacies. Staff problems should always be resolved internally unless an employee proves to be impossible to handle, at which time the supervisor should hand the matter to <u>his</u> superior - and no one else! Any supervisor who announces to his colleagues over coffee that he's going to have to "let so-and-so go", is a poor supervisor. He is not showing respect for his staff and certainly not demonstrating his own ability to command! If he can communicate effectively with his staff, command their respect, understand

their problems, make the best use of their talents, and generate enthusiasm among them, he should never have to "let someone go". Further, discussing his staff's shortcomings with others is an inexcusable breach of confidence.

If a supervisor wishes to talk about his subordinates, he should confine his remarks to their assets. If an employee is doing a good job, his supervisor should tell him, and, more important, pass the word on to his own superiors. Good work should be rewarded - financially and by showing personal appreciation. This motivates the employee to still further efforts.

A supervisor who acquires a reputation for having a top-rate section and excellent staff, enhances his own reputation as an administrator. Justified bragging about a subordinate will help him and certainly won't hurt the supervisor. A supervisor who never praises his staff in discussions with his own superiors, is possibly insecure and afraid of the emergence of a rival.

Finally, a supervisor should ensure that his section runs so smoothly that he is not needed all the time. He should be able to take a three week vacation and know that his staff will continue to function efficiently and capably in his absence. If the operation disintegrates into chaos if the supervisor is away for a few days, there is something wrong! Obviously, he is not delegating responsibility, and he is not enjoying the respect and support of his subordinates.

A supervisor who regards his staff as galley slaves and thinks that everything will grind to a halt in his absence will probably be proved right. But a supervisor who treats his staff like responsible human beings, shows appreciation for their work and delegates responsibility effectively will

reduce the necessity for his own continual presence and reduce his own workload. In Government, there should be no "indispensable man".

(b) Efficiency

A supervisor should know what each job consists of, how long it should take, and what short-cuts should be made. He should be continually striving to find quicker and cheaper ways of performing each operation. Time is money, and the good administrator should always know how much a job is costing in terms of wages, equipment and materials. If a seemingly expensive innovation will pay for itself in time (wages) saved, then it must be seriously considered.

Cost-benefit studies should be a continuing part of the administrator's work. Almost everything can be improved. A Mapping Supervisor should stay abreast of new developments and equipment and ensure that sales representatives call regularly to demonstrate new products. If some new device looks workable, it should be passed on to the Purchasing Office for evaluation.

Environment is another aspect that must be considered. People work better in a pleasant, well-lit, quiet office, than they do in a dingy, crowded, dark and noisy one. As was mentioned earlier, morale and production move together - a depressing environment will lead to reduced output.

The office layout is very important, and here the wishes and ideas of the staff should be considered. Privacy means a great deal to employees, and will also reduce the temptation to indulge in idle conversation. Each employee should have enough space to work comfortably and spread his papers out. Noise and distractions should be minimized - jangling telephones

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and clattering typewriters are not conducive to inspiration.

Filing cabinets, etc. should be conveniently located - a few steps saved on each occasion that a file is checked adds up to a surprising amount of time over a year. Everything should have a place, so that people are not wandering around looking for something and distracting their colleagues.

The supervisor should be accessible without interfering with his subordinates' privacy. He should be able to judge his staff by the quantity and quality of their work, without having to sit watching them all day. However, he should be readily available to answer questions and solve problems without time being wasted by his staff looking for him, or standing around waiting until he is free.

He should always be open to suggestions on how to improve the office lay-out or the working conditions. Anything that will improve morale without interfering with the job should be considered - pictures on the wall, flowers on a secretary's desk, even a coffee pot - these are little things that personalize an office, make it more pleasant, and boost morale. A happy office is a productive office, providing that it is not allowed to deteriorate into a social club. The control rests with the supervisor!

(c) <u>Filing, Indexing and Cross-Referencing</u>

The function of a Mapping Office is the collection, interpretation, processing, storing, and distributing of information. The production of a map is accompanied by an enormous accumulation of documents from such sources as the

Registry and Land Titles Offices, The Department of Highways and Lands and Forests, Planning Boards, Engineering Departments, Aerial Survey Corporations, Railway Companies, Surveyors, Property Owners and the Assessment Division itself.

All of this material must be readily available to the draftsman working on the project and care must be taken to ensure that nothing is overlooked. Once the relevant information from these documents has been incorporated onto the assessment maps, this material may never be used again. However, it is imperative that it be available for reference in case the accuracy of the map is questioned, or a court hearing arises in which additional information may be valuable. The result of all this is an ever growing collection of plans, deeds, sketches and photographs which must be stored so as to be readily accessible if needed.

Even more important, the longer the Mapping Office functions, the more maps, diagrams and charts are produced, all of which must be available instantly. After a few years of operation, there will be literally thousands of internally produced drawings showing a variety of information. The mapping staff must be able to instantly identify and locate the correct map from the street address, roll number or legal description of a property. This should still hold true even if there is a complete change of staff! The essence of Government operation is <u>Positions</u> rather than <u>Individuals</u>. Anyone should be capable of being replaced by another person with similar qualifications.

It is obvious that an orderly, systematic, efficient and flexible system of storing and retrieving documents is one of the highest priorities in the establishment of a Mapping Office. The assessment maps in particular, must be filed in such a way that there is no possibility of their being misplaced.

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If a map involving days or weeks of work becomes misfiled in a cabinet containing two thousand other maps, it will involve a lot of time and expense to find or replace it.

Unfortunately, there is usually considerable pressure on the mapping staff to produce maps. Their effectiveness is gauged by the speed with which drawings flow from their office, so inevitably, such apparently unproductive chores as the setting up of a filing and indexing system are pushed into the background until there is more time available. However, it will be years before many regions are mapped and by that time the situation could be quite out of hand - especially if the interim filing system consists of a pile of rolled up plans in one corner of the office!

No system could be devised that would suit every Region's needs. Each Mapping Supervisor must develop the most practical filing plan for the material that he has available. However, the following suggestions are made for the consideration of each office:

1. One of the most careful and efficient filing systems in Ontario is that maintained by the Land Registry Offices. This is their job, and they have been in business for a long time. It may be well worth while for the Mapping Supervisor to visit the Local Registrar to discuss procedures. However, the main point is that there is little use duplicating the material on file at the Registry and Land Titles Offices. Why should the assessment office waste valuable space storing copies of old deeds and plans, when a duplicate can be obtained quickly and inexpensively from the Registry Office? Why not let them do some of the filing for you? There is really no reason why many photocopies of old deeds and even prints of registered plans, could not be destroyed, once all relevant information had been recorded on the assessment

maps and records. In the unlikely event that they should ever be needed again, a duplicate would cost less than the time involved in numbering, filing and retrieving the assessment office's copy.

2. The township should be adopted as the basic filing unit in rural Regions, and the ward or some distinct geographic unit adopted in Urban Regions. Political units could be used to sub-divide records _if_ they are likely to be fairly permanent. However, Regional Government developments are presently making political boundaries very unstable in many regions. The filing system must be independent of any changes likely to be beyond the control of the assessment office. Where practical, the divisions used by the Registry Office should be considered.

3. All assessment maps and other drawings produced by the Mapping Office should be filed by township, ward, etc., as above, and numbered sequentially. A key map at the beginning of each division would facilitate their retrieval. No one except the drafting staff should have access to these files under any circumstances. Certainly, no one should be allowed to borrow an original drawing "to check something", or to use at the front desk. Only prints should ever leave the drafting room.

4. At intervals, the assessment maps should be microfilmed. There are two reasons why this should be considered:

(a) A fire could wipe out years of work and mean reproducing the damaged or destroyed maps from existing prints of varying quality. A set of microfilms stored in a different location would provide insurance against this:

(b) A duplicate set could be used by assessors and clerical staff dealing with inquiries. They can be showr on a reader and copies made instantly with the reader-printers available in some offices. This would reduce the interruptions to which the drafting staff would normally be exposed.

5. Files should be opened, again on a township or ward basis, for such documents as:

- Registered Plans
- Highway Plans
- Railway Plans
- H.E.P.C. Plans
- Deeds Awaiting Process
- Registry Office Sketches
- Sketches of Survey
- Correspondence Relating to Descriptions
- Zoning Maps
- Topographical Maps
- Aerial Photographs
- Street Maps

These should be filed, in sequence, in folders clearly marked as to the contents. A continually updated list of documents should be in each folder. One person should be given the primary responsibility for maintaining the filing system, updating content lists, etc.

6. A sketch should be prepared for each Township or ward, showing the location of every registered plan of sub-division. There should also be a list of every registered plan in the region, in numerical order, giving its location. This would be very useful in processing deeds and answering inquiries.

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7. It may be found worth while to prepare a list of street names, in alphabetical order, listing the map on which this street is shown. This could be very useful for dealing with inquiries or complaints, where the property owner only gives the street address.

8. A card index system could provide a readily accessible listing of all available documents relating to an area. If properly cross-referenced, it would provide a summary of everything on file and its location. This would assist the draftsman when mapping an area, and would also facilitate inquiries from assessors and tax-payers.

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PART II - COMMUNICATION

The ability to communicate effectively is obviously essential in any profession. It does not matter how many brilliant ideas you may have if no one ever knows about them. Further, it is impossible to rise to the top of any organization (unless your father owns it) without the ability to express your ideas and intentions clearly and in a manner that catches and holds attention.

As a Civil Servant, you will be required to communicate with associates, superiors, subordinates, businessmen, and irate taxpayers, The impression you make, and the effect that your statements have, will help to determine how you are regarded both by your immediate employer, the Ministry, and by your ultimate employer, the Public.

1. CORRESPONDENCE

(a) Memoranda

In Government, as in any large organization, most formal communication - up, down or across - is in writing. There are many advantages to this; the recipient does not have to rely on memory, you cannot be misquoted, you have a record for your own reference, anyone with a possible interest can be automatically kept informed by carbon copies, and a complete record of a particular project can be kept on file. This last point is particularly important in the event that someone else should be called on to replace you on the project.

The office memo is valuable to a supervisor in assigning work, since the employee cannot later claim that he was not instructed to do something. Of course it also protects the employee if he really wasn't told to do it! Finally, a busy supervisor can communicate with all of his subordinates without

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a loss of time, and without missing anyone.

Quite obviously, when you distribute a memo among your associates, it should make a good impression, since it will help them to form conclusions about you. If the memo is sloppy, vague, careless, rambling, disorganized and ungrammatical, your associates can be excused for attributing these characteristics to you; a crisp, concise and efficient memo gives an impression of an organized and capable person. And remember - governments keep records for a long, long, time!

Most large organizations develop their own styles and formats for internal memoranda. The following example illustrates the style used by the Assessment Division:

Ontario

Ministry of
Revenue

Queen's Park
Toronto, Ontario
M7A 1X8

April 7, 1976

MEMORANDUM TO:

FROM:

SUBJECT: Format of Letters.

This is the standard format for internal communication. Letter styles are not used within the Division. The heading contains the information that the recipient requires at first glance, and then the actual message follows. This is more efficient than the traditional letter form, and also simplifies filing.

Signature

c.c. to:

The heading contains the essential information for distribution and filing - the date, the recipient, the sender, and the subject. The full title is given for anyone named in the heading, since it cannot be assumed that everyone who may subsequently encounter this memo will be familiar with every name in an organization of over 2,000 people.

The actual message follows, clearly separated from the heading, and without any formalities or salutations. Contrary to general business practice, it is customary in the Ministry of Revenue to sign memos, although there does not appear to be any official policy requiring this. However, by signing the memo, you signify that it is correctly transcribed, and you assume responsibility for it, and it also lends a rather more personal touch than would otherwise be the case. If copies are to be distributed to anyone other than the person named in the heading, this is shown, so that everyone receiving a copy is aware of its distribution. (This also ensures that no one is overlooked by the typist who mails out the copies).

(b) Letters

Any correspondence outside the Ministry will be in Business Letter Form. There are several recognized styles of business letter and there is some variation in different Areas. The first example is in the Semi-block style with closed punctuation, which is the standard format for the Head Office of the Assessment Division. In the second example, the same letter is shown in the Full-block style, which is often used by the Regional Offices:

Ontario

Ministry of
Revenue

Queen's Park
Toronto, Ontario
M7A 1X8

April 7, 1976

Mr. John Q. Smith, M.I.M.A.,
Metropolitan Assessment Area,
Metropolitan Area Office,
2450 Victoria Park Avenue,
Scarborough,
Ontario.

Dear Mr. Smith:

This is the standard format for the Business Letter, which is intended for general distribution to other Departments, and the general public. A well balanced letter makes a good impression on the reader and thus helps to create a good image of the Department as a whole.

It is preferable to use the recipient's name in the salutation, rather than the impersonal "Dear Sir". If your correspondence is directed to a group of people, the term "Gentlemen" is acceptable.

Yours very truly,

c.c. to:

Ontario

Ministry of
Revenue

Queen's Park
Toronto, Ontario
M7A 1X8

April 7, 1976

Mr. John Q. Smith, M.I.M.A.,
Metropolitan Assessment Area,
Metropolitan Area Office,
2450 Victoria Park Avenue,
Scarborough,
Ontario.

Dear Mr. Smith:

This is the standard format for the Business Letter which is intended for general distribution to other Departments, and the general public. A well balanced letter makes a good impression on the reader and thus helps to create a good image of the Department as a whole.

It is preferable to use the recipient's name in the salutation, rather than the impersonal "Dear Sir". If your correspondence is directed to a group of people, the term "Gentlemen" is acceptable.

Yours very truly,

c.c. to:

The letterhead identifies your organization, and it may include your address and telephone number. The dateline is normally placed two spaces below the bottom line of the letterhead. The inside address contains the same information as goes on the envelope.

The salutation is placed two lines below the last line of the inside address and is directed to the person named at the beginning of this inside address. In Government correspondence, this should be polite but impersonal, and is always followed by a colon.

Paragraphs may or may not be indented, depending on the style of the letter. In a business letter, paragraphs should be short, perhaps a general maximum of six lines, and limited to one sub-topic; otherwise they discourage the reader, and he tends to lose interest. Likewise, sentences should generally be limited to two or three lines; long sentences require concentration or even re-reading, and it is presumptuous to expect this of your reader.

The opening of a letter is like the headline of a newspaper; it attracts the reader's attention, indicates the subject of the letter and, if necessary, links up with previous correspondence.

The "body" of the letter is often referred to as "the message", and this name is significant. The purpose of a message is to convey ideas, facts and information.

The point you wish to make should always be clearly and concisely stated. The fellow who claims that he knows what he wants to say, but can't quite put it into words, isn't kidding anybody! You must know what you wish to say before you start to write a letter. Also, wordiness, flowery phrases and metaphors are fine in poetry, but have no place in Government correspondence.

Be sure of your facts - you are going on record. Accuracy in spelling, grammar and punctuation are equally

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essential; no citizen is going to be very impressed by a Government Officer who cannot spell! All the points in question must be covered adequately to avoid that feeling of "getting-the-run-around," that often results from unsatisfactory contact with Government Agencies.

Courtesy and politeness are indispensable; any hint of arrogance is likely to produce an angry reaction from the reader, and eventually impede the public servant's work. Never forget that you are employed ultimately by the general public.

Finally, avoid "jargon"; remember that while your reader can be presumed to be of average intelligence, he may not be familiar with the exact meaning of many technical terms and abbreviations. Never try to bluff by using technical expressions that you hope will mystify him.

When you have finished what you have to say, stop! Do not fumble around "trusting that the above is satisfactory" and so on. Your final statement should be to the point and provide a logical conclusion to whatever preceded it.

The complimentary closing should not be too flowery. "Yours very truly" is the most popular form of closing, although "Sincerely" is also widely used, depending on the nature of the letter.

The signature establishes the authenticity of the letter, and adds a personal touch - particularly if the writer's first name is included in it. A letter signed by a secretary is an insult to the reader since it implies that you have more important things to do than be bothered signing a letter to someone as insignificant as <u>him</u>! It also creates a suspicion that the letter was probably <u>written</u> by the secretary! A carelessly scrawley, illegible signature also creates this impression of arrogance.

The name and position of the writer must follow the signature, unless the position is clearly shown in the letterhead,

in which case it is not essential. However, all the information required should the reader wish to reply, must be clearly evident in the letter.

The notation regarding the distribution of carbon copies would normally only be on the original, typed copy if it was important to the recipient to know to whom copies had been distributed. Ordinarily, this note only appears on the carbon copies themselves.

Printed "form letters" are a favourite tool of government and probably produce more annoyance, hostility and angry reaction from the general public than anything that could have been deliberately contrived to make people resent the "Bureaucracy!" This is particularly true of the "Blanket" type letter where the answer to the citizen's query is checked off in one of a whole column of little boxes, and is usually quite bland and unhelpful.

Anyone who has carefully composed a polite letter to a government agency, only to receive one of these printed "replies" instructing him to write to yet another agency, can testify to the frustration and annoyance that this produces.

Consequently, the form letter should be avoided, except for cases where a frequent request, or a standard reply to a frequent query, renders it necessary, and even then it should resemble a regular letter as much as possible, requiring only the inside address to complete it. A slip of paper with a check mark in a box is an expression of arrogance that can only hurt relations with the general public.

2. REPORTS

Reports are vital to any large organization, especially government. The senior officers who make the decisions obviously do not have time to also conduct detailed studies and investigations of all aspects. Consequently, this work is assigned to staff members who investigate a particular

subject thoroughly and then present their findings and recommendations in a concise but comprehensive report, on which senior officers can base decisions. Obviously then, the preparation of a report is a highly responsible undertaking; senior administrators will assume that it is accurate, unbiased, comprehensive and reliable. Consequently, a reputation for writing clear, concise and thorough reports is extremely valuable to any government officer who aspires to a senior position himself.

Reports are not only transmitted upwards in an organization. Once approved, they may be used to pass information down the line to all staff members, they may be distributed "horizontally" to other branches and divisions, and they may be used to spread information outside the organization entirely.

Obviously then, they should be interesting, readable and capable of holding the attention of busy men who have many other matters clamouring for their attention. A report should "sell itself" to people who do not have a keen interest in the subject when they first begin reading.

There are four distinct steps in the preparation of a report. First, it is essential to define the scope and purpose of the report so that you can produce exactly what is required.

Next, a thorough investigation of the topic must be made, relevant material assembled and anything superfluous eliminated.

The third step is the assembly of the relevant data in logical order, bearing in mind the requirements of your readers. Finally, the document is put into its final,printed form, in as eye-catching and attractive an appearance as the nature of the report allows.

1. Every report should have a stiff cover, preferably in an attractive colour. On the front there should be a short title containing a maximum of perhaps six or seven words.

This title should be sufficiently "crisp" or specific that it will stick in people's minds--a lengthy or unwieldy title will be abbreviated or forgotten by your readers. Depending on the nature of the document, a design or illustration may be worth considering, to improve the visual appeal of your report.

2. Next comes the title page which repeats the title shown on the cover, usually followed by a descriptive sub-title of possibly 15-20 words. This page also shows the full name and title of the author, followed by the name of the branch, committee, etc. that he represents while submitting the report. The date and place of issue must be shown, and frequently there will be a project number. If appropriate, this title page may also indicate to whom the report is being submitted.

3. Occasionally, this may be followed by a copy of the original instructions or authorization, which is useful for indicating the author's terms of reference and preventing subsequent misunderstandings about the scope or purpose of the report.

4. Next, there may be a letter of transmittal, which is a sort of reply to the instructions, introducing the report and acknowledging assistance, and sometimes fulfilling the role of the preface in explaining the background and scope of the report, and possibly noting points of particular interest, conclusions, recommendations, etc.

5. If preferred, the above points can be in a formal Preface, in which case, the letter of transmittal can be quite brief, or may even be omitted entirely.

6. In a long report, there should be a Table of Contents, listing the contents in sequence from cover to cover,with headings, sub-headings and page references. If your report is not set out in a logical sequence, this will be painfully evident from the Table of Contents.

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7. If there are a number of illustrations, tables, maps, photographs etc., they should also be listed, with page references.

8. The actual body of the report should always be preceded by a Summary, which is a condensed version of the entire report, covering the major points, and the main conclusions and recommendations. Not everyone will have time to read the entire report, and the summary provides all the information some people will need. At least, they will know what the report is about, which will enable them to decide whether to read the entire document or not.

For those who are planning on reading the report through, the summary provides a comprehensive view that facilitates a more intelligent reading of the entire document--the reader will know the results and main conclusions before he begins to study the details and explanations.

9. The first part of the narrative should be in the form of an introduction. This should provide enough information to enable the reader to understand the rest of the report, and to arouse his interest. The amount of introductory material required, will depend on the knowledge of the person or persons for whom the report is intended. When a report is to be widely distributed, care should be taken to ensure that sufficient background information is provided to assist the average reader.

10. The introduction should lead smoothly into the main "body" of the report, which is devoted to presentation, analysis and interpretation of relevant data, properly divided under headings and sub-headings, and in as clear and logical a manner as possible. Always bear in mind that reports are read by busy people who wish to learn as much as possible in a minimum amount of time.

11. The concluding part of the report should provide a comprehensive evaluation of all that has preceded it, stating

the author's conclusions based on a sound and logical study of the material gathered. The conclusions should reinforce the views that will probably have been reached by the reader, if the material has been presented properly. However, facts substantiating these conclusions should be briefly reviewed.

12. The most important part of any report is the Recommendations. The usual reason for preparing a report is to assist senior personnel in making decisions, and the Recommendations section supplies them with clearcut proposals to approve, modify or reject, based on the author's study and conclusions.

Because the recommendations are so important, they are often placed at the beginning of the report, that is, immediately preceding the introduction, rather than after the conclusions where they would logically be expected. This enables busy readers to simply study the Summary and Recommendations, without having to concern themselves with the details in the narrative.

13. Footnotes in the text may be used for two purposes. The most common use is to acknowledge source material--author's name, title of publication, publisher, date, and page number. Footnotes should not repeat any information given in the text; they should be numbered successively from the beginning to the end of the report, and while the first reference to a publication must be fully documented, subsequent references may be shortened considerably.

If they become too bulky, or break into the text seriously, they may be grouped at the end of the report as "references" or "notes".

A second use of footnotes, is for author's comments which might disrupt the continuity of the narrative if included right in the text. This may be particularly useful if the author has personal reservations about some of the material.

14. Any illustrations which will assist the reader--drawings, photographs, tables, graphs or charts, should be included in the narrative, properly positioned so as to re-inforce the points that you are making, and introduced by a reference in the text. Illustrations should be as interesting and straightforward as possible to the average reader.

Suppose, for example, we wished to illustrate the average level of property taxes over the past twenty years. It may be more meaningful to the average reader to do this by comparing taxes to income and to other expenditures, such as automobiles, housing, clothing, entertainment, etc. Since most people will not read columns of figures, however, this should be shown in pictorial form, by a bar-chart, or by dividing a circle into portions to represent parts of the tax-payer's dollar. (An interpretation of the points illustrated should also be incorporated into the text). A little imagination is well worthwhile when devising illustrations.

15. If there is a great deal of illustrative material, it can be collected into an Appendix at the end of the report. An Appendix is a convenient "catch-all" for any kind of supplementary material--maps, correspondence, questionnaires, bulky extracts from source material, and data that may be useful to the reader, but which would interrupt the flow of the narrative if included in the body of the report.

All this material should be grouped according to type and listed as Appendix A, B, C, etc.

16. If printed sources of information have been relied on in preparing your report, but have not been used specifically enough to be listed in footnotes, these sources should be recorded in a bibliography, following the Appendix. This will enable an interested reader to explore the subject further if he so desires. It is customary to list these references alphabetically by author's surname.

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3. THE TELEPHONE

The telephone provides the most direct link between the citizen and his government. In our society, we are accustomed to phoning to save time, rather than writing or paying a personal visit. Consequently, most people with a problem or an inquiry will instinctively reach for their telephone.

On the basis of the response they get, they will form impressions about the people, and the organization, at the other end of the line. Few of them will ever have face-to-face contact with the person who answers their query. Obviously, if they receive an off-hand, ill-mannered response and get passed around from one disinterested person to another, only to be finally told that the only person who can help them is out for coffee, they are rapidly going to reach boiling point, and will retain an impression of bumbling inefficiency for a long time!

Few people have any real understanding of government operations; some may be a little nervous and hesitant--a few may even be belligerent. However, they all feel that they have a worthwhile reason for calling, even if their problem seems trivial to you.

You must develop a pleasant and courteous telephone manner, that will create an image of maturity and competence in the mind of your caller. Always introduce yourself when you answer the phone, and no matter how belligerent and stubborn your caller may be, you must always be sympathetic, good-humoured and cooperative. Never be sarcastic, or allow yourself to be goaded into an argument. Try to see things from your caller's point of view--maybe you'd feel the same way if you were in his position!

If you are unable to deal with the tax-payer's problem yourself, find out who can help! Transfer the call if possible, or look up the number and supply it to your caller. If you promise to call him back within a certain time, make sure that you do! Above all, try to ensure that when your

caller hangs up, he is satisfied, and feels that his call achieved its purpose, even if all he wanted to do was let off steam! Good public relations will pay countless dividends for a long time--if not for you personally, for other Public Servants in your region and beyond.

Always remember that you are a Public Servant; what kind of service would you hope for, if you were calling a government office?

4. Metric System. As you know, some time in the not too distant future the Metric System of measurement is going to be introduced to Canada. When this occurs, we in the Assessment Division are going to find it necessary to convert all our linear measurements to metric measurements. To familiarize our mapping staff with the new system it is being introduced here.

The metric system is really quite simple to use. It is based on a universally accepted standard - the metre. The original standard was chosen to be one ten-millionth of a quarter meridian-the distance from the pole to the equator. This works out to be 39.37 inches. As the French devised this system and borrowed the word "metre" from the Greek word for "a measure"-metron. The decimal system is employed when larger or smaller units are to be obtained. Set out below is the metric linear and area measurement systems.

Linear Measure

10 millimeters (mm)	=	1 centimeter (cm)	
10 centimeters	=	1 decimeter (dm)	= 100 millimeters
10 decimeters	=	1 metre (m)	=1000 millimeters
10 meters	=	1 dekameter (dkm)	
10 dekameters	=	1 hectometer (hm)	= 100 meters
10 hectometers	=	1 kilometer (km)	=1000 meters

Area Measure

100 square millimeters	=	1 square centimeter (cm^2)
10,000 square centimeters	=	1 square meter (m^2) = 1,000,000 square millimeters
100 square meters	=	1 are (a)
100 ares	=	1 hectare (ha) = 10,000 square meters
100 hectares	=	1 square kilometer (km^2) = 1,000,000 square meters

Conversions

Accurate to Parts Per Million

inches X 25.4	=	millimeters
feet X 0.3048	=	meters
yards X 0.9144	=	meters
miles X 1.609 34	=	kilometers
square inches X 6.4516	=	square centimeters
square feet X 0.092 903 0	=	square meters
square yards X 0.836 127	=	square meters
acres X 0.404 686	=	hectares
millimeters X 0.039 370 1	=	inches
meters X 3.280 84	=	feet
meters X 1.093 61	=	yards
kilometers X 0.621 371	=	miles
square centimeters X 0.155 000	=	square inches
square meters X 10.7639	=	square feet
square meters X 1.195 99	=	square yards
hectares X 2.471 05	=	acres

A good table of equivalents can be found in Mathematics Tables and How to Use Them, pp. 173, 174 and 178-179.

APPENDIX 'A'

SUGGESTED READING

1. Anderson, D.L. (ed) Municipal Public Relations. Chicago, Ill.: Institute for Training in Municipal Administration, 1966.

2. Blau, P.M. Bureaucracy in Modern Society. N.Y. Random House, 1956.

3. City of Beverly Hills, California. Public Relations Training Manual. Beverly Hills, Calif.: City of Beverly Hills, 1962.

4. Dubin, R. et al. Leadership and Productivity. San Francisco, Calif.: Chandler, 1965.

5. Etziozi, A. Modern Organizations. Englewood Cliffs, N.J. Prentice-Hall, 1964.

6. Golembiewski, R.T. et al. (eds) Public Administration. Chicago, Ill,: Rand McNally, 1966.

7. Hodgetts, J.E. and D.C. Corbett. (eds) Canadian Public Administration. Toronto: Macmillan, 1966.

8. Hicks, C. B. and I Place. Office Management. Boston, Mass. Allyn and Bacon, 1963.

9. Hogson, J.S. Public Administration.
Toronto: McGraw-Hill, 1969.

10. I.A.A.O. Personnel Administration, Monograph No. 5.
Chicago, Ill.:
International Association of Assessing
Officers, 1969.

11. Pfiffner, J.M. and R.V. Presthus.
Public Administration. N.Y.: Ronald
Press, 1960.

ASSIGNMENT LESSON VIII - EDITION TEN

1. Using the format as outlined in this lesson book, prepare a formal report on converting the mapping section to the metric system. Some suggested areas to cover are:

   a. staff training

   b. equipment changes

   c. converting assessment maps

   d. tentative completion dates

   e. recommendations, etc.

NOTE: This is strictly an exercise in report writing and should not be considered as an official report to Head Office. It will only be read by members of the course, so no recommendations contained in your report can be acted upon.

2. Write a brief review (approximately 200-300 words) of an article or book on Management Principles. This may include any of the listed readings in Appendix 'A' or a reading of your own choice from the library or any other source.

3. Describe the filing and indexing systems used in the assessment mapping programme in your regional office.